Moving a parent to assisted living: 60-day checklist

Week by week, from the day the move becomes real to the first week in the new apartment. Tick each box when it's done.

Parent: Start date: Target move-in day:

Week 1 Get your bearings

Dates: _____ to _____

- [ ] Write a one-page summary: what happened, what the doctor or discharge team said about the help your parent needs, and a target move-in date.
- [ ] Hold a 30-minute family call. Talk about who can help and how many hours a week.
- [ ] Agree on one place for information, such as a shared folder and one sheet.
- [ ] Ask your parent what matters most. Write down their top five in their own words, and take the list to every tour.
- [ ] Ask the care team what level of help they recommend, and whether there's a written care assessment.
- [ ] Agree on a monthly budget range with whoever handles finances.
- [ ] If Medicaid, VA benefits or long-term care insurance may be part of the picture, book an elder law attorney now.
- [ ] Build a long list of 6 to 10 communities. Use the state licensing agency, the local Area Agency on Aging, friends and directories. Ask how each directory makes money.
- [ ] Look up state inspection reports.
- [ ] Call each community about openings, price range and the help they provide. Ask each one for its own fee list.
- [ ] Book three or four tours.

Your parent's top five, in their own words

1 _____

2 _____

3 _____

4 _____

5 _____

Weeks 2–3 Tour and choose

Dates: _____ to _____

- [ ] Tour with the same questions everywhere.
- [ ] Score each place within 24 hours.
- [ ] Eat a meal there.
- [ ] See the actual apartment that is open, as well as the model unit. Measure it.
- [ ] Take the residency agreement and fee list home. Don't sign on a tour day.
- [ ] Write down questions about fees, rate increases, notice periods and when a resident would have to move out. If anything is unclear, an elder law attorney can review it.
- [ ] Visit your favorite again at a different time, such as an evening or a weekend. Bring your parent if you can.
- [ ] Decide and reserve. Confirm the apartment, move-in date and deposit.
- [ ] Ask for the floor plan with measurements and the list of move-in forms.

Tours

Same questions everywhere. Score each place within 24 hours.

Community	Tour date	Score

Who can help, and how many hours a week

Name	Hours

Weeks 4–7 Plan the move and downsize

Dates: _____ to _____

- [ ] Measure the furniture your parent wants to keep and draw it on the floor plan.
- [ ] Leave a clear path from the bed to the bathroom. ADA guidelines use 36 inches for accessible routes.
- [ ] Choose the comfort items first, such as the chair, the reading lamp, their bedding and photos.
- [ ] Get three quotes for movers or a senior move manager. Ask whether the community requires a certificate of insurance.
- [ ] Start a family claims list. Deadline: _____
- [ ] Sort room by room, starting with the rooms your parent uses least.
- [ ] Set up mail forwarding.
- [ ] Change the address with:
  - ☐ Social Security ☐ Medicare and other insurers
  - ☐ the bank ☐ the pension plan ☐ the pharmacy
  - ☐ subscriptions
- [ ] Ask the community for its move-in rules in writing: what's provided, what's not allowed, the move-in times, the elevator booking and how medications are handled on the first day.
- [ ] Hold a 15-minute family check-in every week. Shift tasks if one person carries most of the load.
  - ☐ Week 4 ☐ Week 5 ☐ Week 6 ☐ Week 7

Weeks 8–9 Pack and prepare

Dates: _____ to _____

- [ ] Pack what your parent won't need before the move, labeled by the room it goes to.
- [ ] About a week ahead, confirm the admission paperwork is complete:
  - ☐ the doctor's forms ☐ any required tests
  - ☐ the medication list ☐ emergency contacts
- [ ] Set up the apartment one or two days early, if the community allows it. Make the bed, put the photos up, and place the chair and lamp where they were at home.
- [ ] Pack a first-night box that travels in the car:
  - ☐ bedding ☐ pajamas ☐ toiletries ☐ glasses
  - ☐ chargers ☐ the TV remote ☐ a few photos
- [ ] Keep the last day quiet for your parent, with nothing new.

Move-in day

Date: _____

- [ ] One family member stays with your parent the whole day. Others handle the movers and the apartment.
  With your parent: _____
- [ ] Hand over medications and paperwork exactly as the community asked.
- [ ] Meet the key staff.
- [ ] Eat a meal together in the dining room.
- [ ] Before you leave, write down when you'll next visit or call, and put it where your parent can see it.

The first week

- [ ] Keep contact short and regular.
- [ ] Fix small things.
- [ ] Try two activities.
- [ ] Ask when the first care plan meeting is.
  Date: _____
- [ ] Some sadness and tiredness in the first weeks is common. If you're worried about health or mood, talk to the staff and your parent's doctor.

Who to ask about what

Question	Who to ask
Medicaid, VA benefits, long-term care insurance	Elder law attorney or benefits counselor (via the Eldercare Locator, 1-800-677-1116)
Power of attorney, health care proxy	Elder law attorney
Level of care, memory care, medications	Your parent's doctor and the community's nurse
The residency agreement	The community first, then an elder law attorney if anything is unclear
Selling or renting the house	Real estate professional, attorney or tax advisor
Hands-on help with the move	Movers or a senior move manager (NASMM directory)

Every step explained in the full guide: parentmoveplan.com/guides/moving-a-parent-to-assisted-living-checklist/

General information for organizing a move. It is not legal, financial or medical advice.